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ABSTRACT

The Institute was set up to introduce an alternative to current methods of staff supervision. To implement this alternative, members of the Boston Department of Staff Development were trained in effective interpersonal communication, a goal-setting technology to enhance teacher motivation, procedures for setting meaningful and measurable objectives, and the use of evaluation processes to change behavior and to improve performance. The training instruments used in the course, such as case studies, simulations, games, and problem solving and action planning are discussed in the report along with an evaluation of the effects of the training. (JF)

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Evaluation of the Boston-Harvard EPDA Summer Institute In Administration

(June 5-16, 1972, at Harvard)

By

C. Brooklyn Derr
Institute Director

December 8, 1972

EA 005 157

JUN 5 1973

Evaluation of the Boston-Harvard

EPDA Summer Institute In Administration

The Boston-Harvard Summer Institute for the Department of Staff Development grew out of discussions held in January, 1972, between Marion Fahey, Associate Superintendent and C. Brooklyn Derr, Assistant Professor of Education, Harvard Graduate School of Education. Generally interested in some form of organizational training for individuals at the staff level, Miss Fahey and Professor Derr tentatively agreed upon a summer program which would "introduce an alternative to current methods of staff supervision".[1] For such an alternative to be implemented, Derr proposed that members of the Department of Staff Development be trained in effective interpersonal communication, a goal-setting technology to enhance teacher motivation, procedures for setting meaningful and measureable objectives, and the use of evaluation process to change behavior and improve performance.[2]

The Staff Development Department has traditionally been viewed as responsible for the evaluation of non-tenured teachers in the system. More recently, however, the role of the department has been changing from evaluation to consultation on teacher effectiveness (e.g. running workshops, making helpful suggestions, providing extra information and resources.) Moreover, the Board of Associate Super-

1. letter from Derr to Fahey on February 9, 1972
2. Ibid.

intendents now uses members of the department for many special ad hoc assignments relating to the schools (e.g. to work on and help design the open classroom concept, to lend assistance to an Area Superintendent for a given problem, to make early morning calls for supplying substitute teachers to schools.) The Harvard group believed, at the outset, that improving the behaviors and effectiveness of this crucial department would be a strategic intervention in the school system. Evaluators (it was reasoned), control the rewards and punishments for the organization, and internal consultants, if effective, can really alter teacher performance in the classroom.

It was proposed that, in order to plan a training design in response to the specific needs of the Department of Staff Development, a representative committee of staff members be appointed to work with a team from Harvard. The Joint Committee met first on April 4, 1972, and held four subsequent meetings during which they reacted to proposals presented by the Harvard group and planned collaboratively all aspects of the two week workshop. Boston was represented initially by the Director of Elementary Education, the Director of Secondary Education, the Director of Staff Development, and the Boston staff member who acted as a liaison between Boston and Harvard.

During four subsequent meetings the planning committee reacted to and modified suggestions and plans presented to them. During this same period the Harvard team, composed of Professor Derr and four advanced graduate students in educational administration, met

weekly to design the program, listen to tapes of meetings with the Joint Committee and experience aspects of the proposed training.

The Joint Committee first of all tried to define for the Harvard team their perceptions of needs in the department. These differed, often significantly, from previous information and, as a result, the nature of the training was modified. Instead of an emphasis on a management-by-objectives approach to teacher evaluation, it was decided that the training program should emphasize personal introspection to be more effective helpers, building human relations skills and setting departmental goals and objectives. In the vernacular, there was a need for the department to "get itself together" before extending outward.[3]

The Joint Committee (JC) assumed responsibility for establishing the dates and hours of the training, for communicating with members of the Staff Development Department and for determining how the general agreement between Miss Fahey and Professor Derr could be implemented in such a way that the needs of the department could be most effectively served. The Joint Committee was also involved in all future discussions of the training program between Professor Derr and Miss Fahey.

Derr and his colleagues were also experimenting with developing a collaborative model for working with the system. They made initial assumptions that this group was representative of the department

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3. see Appendix I, "The Training Design"

(which assumptions later proved to be unfounded and one of the major problems for the actual training.) They then tried to react openly and responsively to the interaction. The training design that evolved not only represented a joint effort in determining the substance of the workshop, but also created a collaborative process which members of the Joint Committee thought to be important. Hopefully, there would be more ownership of the goals of the training, a more valid program that addressed the real needs of the department, and there would be behavior modeled with the JC that would carry over into the workshop and make it maximally effective and flexible.

The two week institute, held from June 5-16 in the Gutman Library of the HGSE emerged as a combination of lecture, reading, case study and analysis, simulations, games, discussions, data collection and feedback, problem solving and action planning. Participants were also offered four graduate credits for completing the sequence which included the workshop itself, attendance at follow-up sessions, and the completion of a paper critically analyzing the training, the program, and the results in terms of their own performance.

The major themes of the workshop were communication skills, establishing performance objectives, the helping relationship, effective work in groups, and problem-solving and action-planning. The training itself, as developed through work with the Joint Committee, as introduced through at initial contracting sessions, and as renegotiated through later contracting sessions, was intended to model qualities of the helping relationship. Data collected about

individuals' motaivation and the organizational climate of the Department of Staff Development was intended both to provide the group with information about itself and to serve as a means by which the impact of the training could be measured.

The initial contracting session on the first day of the workshop was designed to allow for modifications in the proposed training. Some dissatisfaction was expressed regarding the degree to which Boston members of the Joint Committee were either representative of the twenty members of the Staff Development Department or capable of developing a training program which could respond to everyone's needs.[4] The group agreed to proceed with the training as described, but in later contracting sessions continued to express some dissatisfaction with the kinds of exercises and simulations which the Joint Committee had planned. After much hard work and some modifications, however, the whole group did come to "own" the training design.

The first week of the training focused on the skills necessary for an alternative method of staff supervision. Four communication skills (paraphrasing, describing feelings, describing behavior, and checking perceptions) were introduced and practiced. Forces determining motivation were examined and experienced through the "business game," and a discussion of the Juan Velasco case. The group examined the nature of the helping relationship through a block piling exercise, through lecture and discussion, and through analysis

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4. see Appendix II, "The Contract" and "Events Supporting The Contract."

of the Karen Merconi Case. Finally procedures for establishing initial contact with individuals to be assisted (entry) and the process by which that type of assistance is specified (contracting) were introduced and practiced. As a way of practicing and testing newly developed skills and attitudes, small groups viewed films of different teaching styles and then evaluated the teaching according to the critera learned in the workshops.

A second major emphasis of the workshop was the application of a problem-solving/action planning structure to the problems and difficulties of the Department of Staff Development itself. In small groups established according to interest, the trainees used the structure to set department-wide goals, to identify those forces restraining and facilitating the goal, and to plan for the implementation of those goals. In the process, the group used skills such as brainstorming, force-field analysis, and a consensual decision making process.[5] Task groups dealt with decision making, communication, the development of a resource center, evaluation, and the role of the Assistant Director. For all but one of these groups a report was published describing a specific goal statement, restraining forces, facilitating forces and action plans to reduce the effect of restraining forces.

A final contracting session established the need for a more representative Joint Committee and the election process by which two new members would be added from Boston. In addition plans were made

5. See Appendix III, "Organizational Goal-Setting and Problem-Solving

for follow up meetings throughout the following fall and winter. The expanded Joint Committee with two newly elected members met in early October to plan a workshop for the Department and to raise any new issues or problems which had emerged since the workshop.

A group of surveys and questionnaires were administered to help the group examine itself and to measure changes as a result of the workshop experience. Based on achievement motivation psychology,[16] a "Work Analysis Questionnaire and Profile" asked workshop members to describe their own jobs and the degree to which they are responding to motivations in each of the categories established in the motivation analysis. Once again assuming that the demands of the job require a moderately high mix of affiliation, power and achievement, no discrepancy was found between the needs of the jobs and the way individuals perceived it. Because there is, in fact, a good mix of required motives needed to perform effectively,[7] persons in the department should also possess such a mix of motive needs and styles.

A "Motivational Style Questionnaire" was given to the group before they attended the training. Through it information regarding the way staff development personnel behave as leaders was developed. Again based on achievement motivation psychology, three categories of motivation are described: power, affiliation and achievement. Ideally the assistant directors should be serving as consultants, facilitators, and

6. see David C. Mc Clelland, The Achieving Society (1961) and Alfred S. Alschuler et al., Teaching Achievement Motivation (1970)

7. See Appendix IV, "Work Analysis Profile"

evaluators; and such a mix should probably require a motivational style which draws upon all three categories. The "dominant" style was found to be "authoritarian" (power) with a frequency of 8.5 (out of 10.0). Second order styles were also found in each of the other categories: "coach" (7.4), an achievement motivator, and "democrat" (7.54), an affiliative motivator. It was felt that though the mix of the three styles was appropriate, the affiliative and the achievements motivations should equal the power in frequency of use.

The information from both questionnaires was then made available to participants, categories were explained, and the need for more or less of the motivational styles and work opportunities was discussed.

In addition, each workshop participant received back a graph illustrating his own motive profile (i.e. his power, achievement and affiliation needs) and was asked to consider the possibility that either (1) those needs were not congruent with the demands of the job, in which case he should change or leave, or (2) the needs were not properly mixed for maximum effectiveness in the role. The limitations of the diagnostic instruments were discussed, and people were asked to use the instrument, as well as their own knowldege of themselves to consider the need for change and possible directions.

A second area of inquiry examined the organizational climate of the Department of Staff Development. Members were questioned to reveal attitudes toward the relative degrees of imposed conformity, the degree

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8. see Appendix V. letter describing the Exercise in Imagination and the total group "Exercise In Imagination Profile" representing cumulative responses for Staff Development.

of which management gives them real responsibility, the quality control or standards of management, whether employees are rewarded for performance, organizational clarity, and team spirit. Table 1 below records the responses on pre-tests (pre-workshop) and post-tests (post-workshop) in the six categories.

Table 1

Change In Perceptions of the Actual Climate: Pre-Workshop v. Post-Workshop Scores

	conformity	Respon-sibility	Standards	Rewards	Clarity	Team spirit
Pre-	14.7	12.7	15.5	16.1	13.2	19.5
Post-	15.5	12.5	14.1	13.6	10.4	18.0

The following profile graph (Figure 2) is more illustrative of the differences.

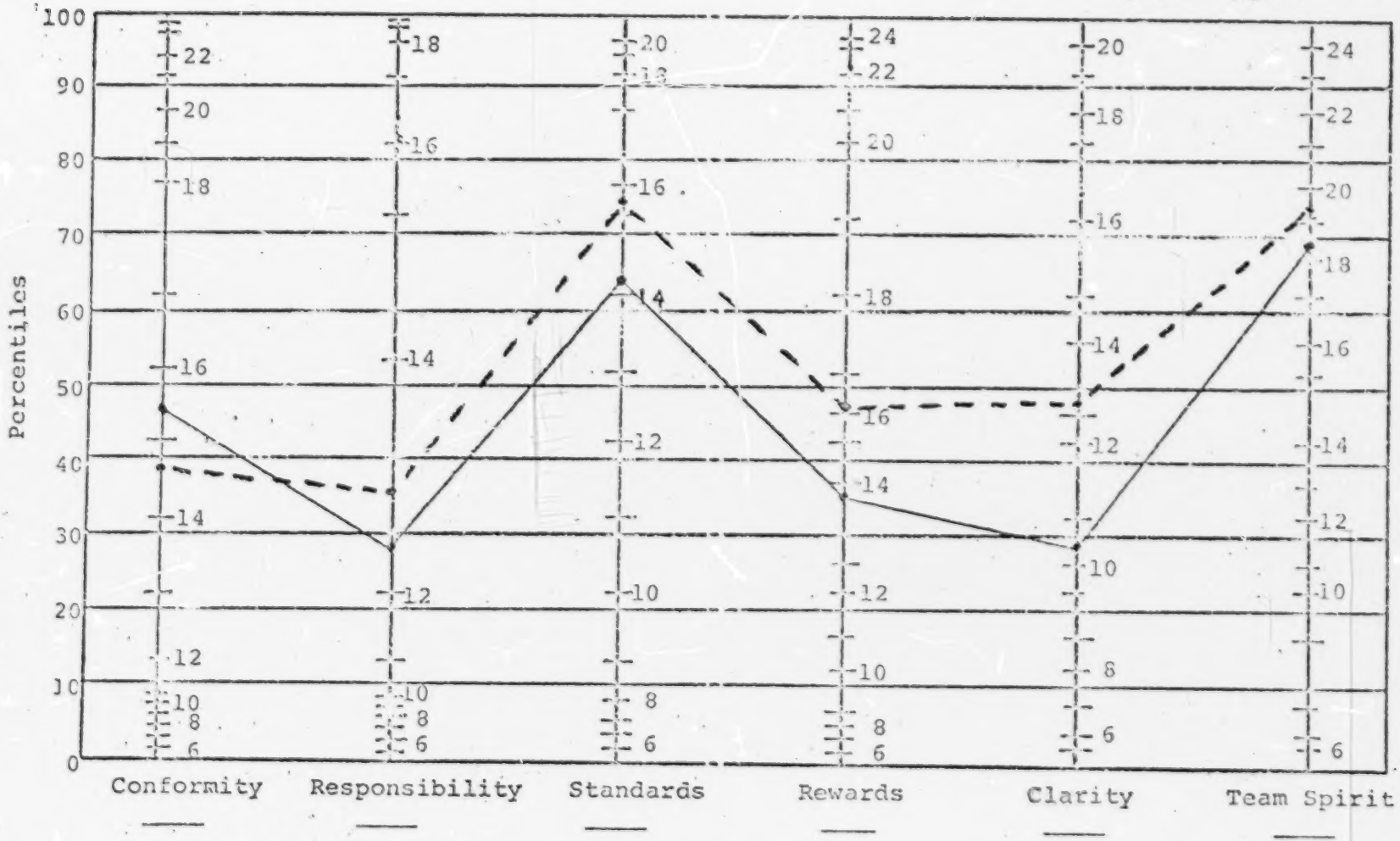
It is interesting to note that there is no statistical difference between pre- and post-test scores. In fact, the trend is for the organizational climate to become more negative (i.e. the climate scores decrease) following the workshop. Does this mean that the training failed? There are several possible explanations for this negative movement. First, the workshop was designed to improve individuals behaviors and skills, not necessarily to improve the organization which affects these behaviors and skills. It may have become clear to participants at the end of the workshop that practicing their new skills

FIGURE 2

PROFILE SHEET FOR CLIMATE SURVEY

POST-TEST ——

PRE-TEST - - - -



and behaviors would be impossible without organizational support. Second, the post-test scores may be seen as a more accurate description of the organization since the training was also designed to increase openness, honesty and trust between the Assistant Directors and the Harvard team. Thus the pre-test scores could represent the attempt of the participants to convince outsiders that the organization is really better that it is. This interpretation is supported by other data which suggest that people began the workshop suspicious of the training team and ended feeling as if the relationship were a collaborative one.

A third explanation for the decline in scores is that the post-test was administered immediately before a concluding meeting between the workshop group, the department director and the Associate Superintendent for Staff Development. The participants were going to present their sub-group recommendations for departmental improvement and were obviously nervous and upset about rumors of a possible confrontation between themselves and the people in authority. These feelings could have biased the data. Finally, it could be that as a result of the insight gained at the training workshop members saw that major changes in organization would have to take place before they could be effective; they were more pessimistic and cautious about descriptions of the climate than they were in the pre-test.

Table II below reveals what individuals perceive as the actual climate (post-test results) contrasted with what they feel the climate should be (post-test results) contrasted with what they feel the climate should be (post-test results). The group perceive that their

jobs were weakest on the following dimensions: clarity (things are not well organized, rather they are disorderly, confused and chaotic) responsibility (individuals are delegates work rather than given the opportunity to initiate) and rewards (people are not being recognized and rewarded for doing good work. On the following dimensions the job was seen as strongest; interpersonal relationships (people are warm and friendly; loyalty and trust prevail) and standards (management puts a strong emphasis on doing a good job.

Table II

Comparison of Normative v. Actual Organizational Climate

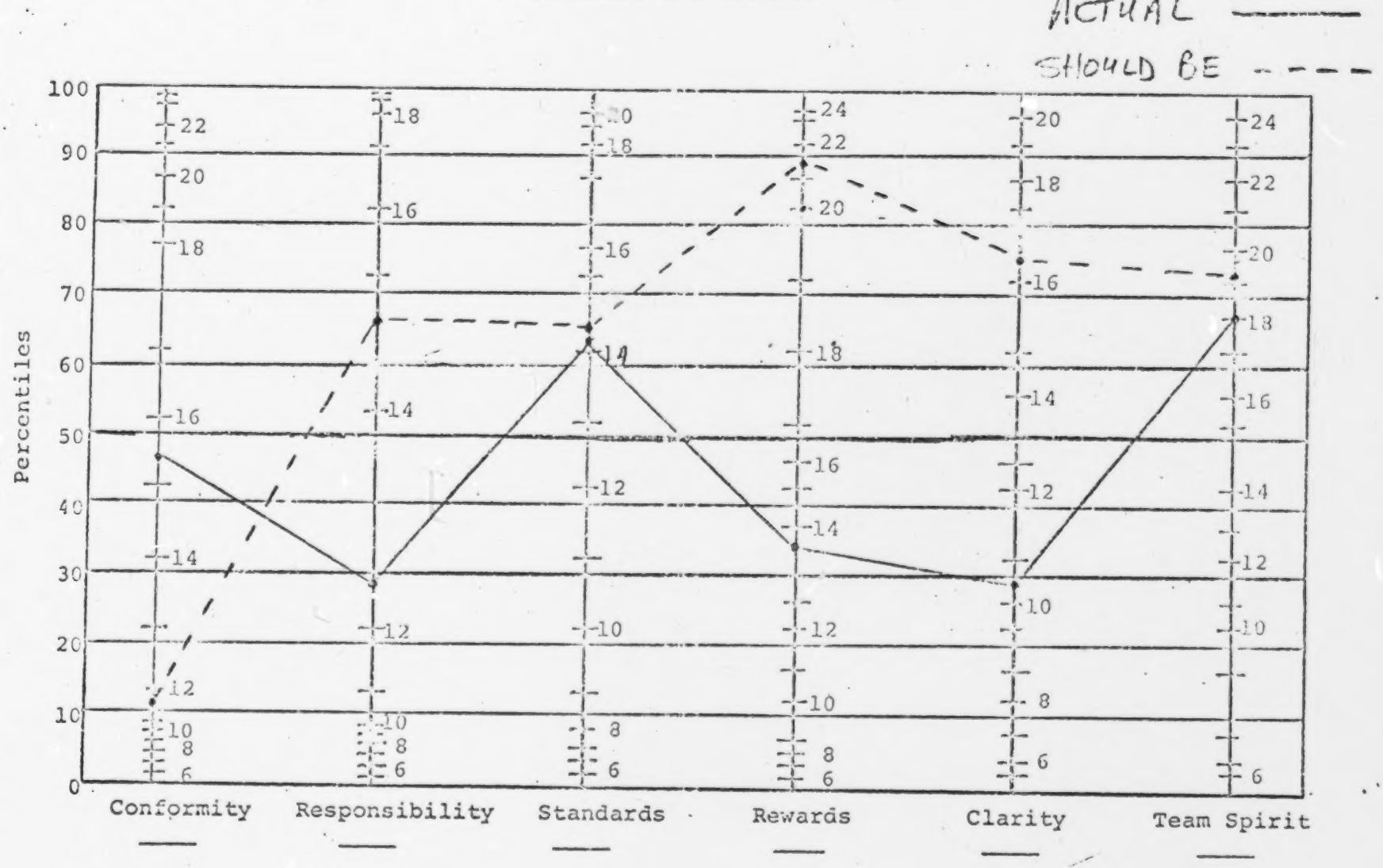
	Conformity	Responsibility	Standards	Rewards	Clarity	Team spirit
Actual	15.5	12.5	14.1	13.6	10.4	18.0
Should be	11.5	15.1	14.5	21.4	16.2	19.1

The following graph, Figure 3, illustrates the points.

It should be obvious that members of the department desire an organizational climate quite different from the one they actually perceive. They want much less conformity, more responsibility and much more rewards and organizational clarity. Furthermore, in validating the data with the participants through feedback it was learned that these perceptions extend beyond the Staff Development

FIGURE 3

PROFILE SHEET FOR CLIMATE SURVEY



Department to also include how they feel about the organizational climate in the whole school system.

At the conclusion of the workshop, the Harvard team was evaluated by Boston participants in terms of how well the contract, established at the start of the training, was fulfilled. In general, the majority felt that the contract had been fulfilled 12 without reservation, 5 with slight reservations, 2 with real reservations, 2 "slightly failed", 0 definitely failed.

In terms of what was most meaningful to them, people liked the following aspects of the workshop: organizational goal-setting and problem-solving (8), communications skills (8), working in groups generally (9) personal profiles and motivation feedback (7), entry procedures (4), managing motivation (3), block building and the helping relationship (3), establishment of a frame of reference for department identity (2), getting away from the office for learning (2).

Participants felt that the following skills were most successfully taught: communication skills (6), goal-setting and problem-solving (8), working in small groups (5), helping relationship (9), Harvard teams' modeling behaviors or practicing what they "preached" (4), everything (9). In the following areas the need for some improvement was indicated: being more flexible (1), moving at a less rapid pace and stress digest of skills (8), using fewer fames (2). Several individuals felt that communication skills (1) and block building (1) were poorly taught.

Participants offered the following general reactions to the

program: participants could have been better informed at the start regarding the expectations of those planning the workshop (6); there should be a clearer connection between training and on-the-job activities, particularly with respect to the games; the pace of the activities was too rapid (2); there was too little variety in the beginning of the training, but that greater variety was introduced as the workshop progressed (2); large group presentations were sometimes hard to hear and charts were hard to read (1); more mini-lectures should have been given (1); a bibliography should have been available at the stard (1); there should have been more summaries of major points (1); there should have more case studies (1); regular attendance should have been required of everyone and principals should have been excluded (1); pressure was too great during the last two days (1).

Participants in the workshop were asked to evaluate changes in their own attitudes as a result of the training. Ten now felt a need for improvement in the dimensions examined during the workshop. Six felt that they had a better understanding of themselves and saw ways to improve. And two felt that they had learned new skills. With respect to changes in others, three participants felt that everyone was more aware of himself; one felt that the payoff would occur later, and one felt that he knew other people better, but did not see any major changes in behavior.

Changes in the way the Staff Development Department as perceived by its members were as follows: greater unity as a result of the

workshop (7); better communication as another result (6); the beginnings of greater honesty (6); conflicts were exposed (3); the workshop opened a "pandora's box and could lead to trouble.

The Harvard staff believe that although the Summer Institute was a success, there is still some question as to whether significant change will really occur. The major problems are organizational and political: waiting to see how the new Superintendent views their functions, uncertainty as to whether and how other persons above them see the eventual changes in role, uncertainty as to how secure their jobs really are, and pessimism about the possibilities for really changing the organizational climate from the bottom up. Unfortunately, Harvard agreed to work at the level of changing individual behaviors and building new skills, and the team has not really been invited to tackle some of the other more pressing problems. For these reasons, it could be argued that though the training reached the individuals intended, it may have failed to make a substantive difference in the operations of the Boston School System.

APPENDIX I

Training Design:

Boston-Harvard Summer Institute

The Staff Development Department

And Selected Principals

June 5-16

Harvard

C. Brooklyn Derr, Director

Ed Dreby

Ellie McGowan

Mark Munger

Bill Zayas

Monday — Contracting, Research, Communication

9:00 introductions and coffee

9:30 initial contracting

a) goals of training (see Appendix)
b) logistics
c) policy on part-time participants (Vic Atkins, Marion, Gloria)
d) background on meeting with Joint Committee out of which emerged the design
e) the nature of our collaborative process
f) research rationale

10:00 data collection

12:00 lunch

12:30 lecturette on communications and introduction, experience and debriefing of four communication skills: paraphrasing, description of feelings, behavior descriptions, checking perceptions

2:15 reading material on communication

Tuesday — Understanding Motivation

9:10	lecturette on the three social motives and read "Three Patterns of Behavior"
9:30	achievement-oriented experience with goal-setting: the business game
12:30	lunch
1:00	Juan Velasco case
	a) read the case
	b) introduce the concepts of task and process for small group team-building
	c) discuss case in small groups while using above concepts plus communication skills
2:00	Large Group Case Discussion
HW	read "Action and Thought" pp. 1-3; do "Practice Scoring for Imagery," pp. 4-6.

Wednesday — The Helping Relationship

9:10 Block Piling simulation on helping behavior

a) 3 pairs of players (wait outside) while others act as observers to describe behaviors

b) work on contracting

10:45 lecturette and discussion on the nature of the helping relationship

11:30 lunch

12:00 Karen Merconi Case

a) small group discussion

b) large group discussion of individual job fit

1:30 data feedback of work analysis questionnaire (discussion of job requirements)

2:00 Contracting

2:30 Party

Thursday — Data Feedback on Self

9:10 scoring your school-oriented TAT and lecturette on the motivational scoring system as a tool for individual change

10:00 Feedback individual motive profiles and discuss

10:30 Break

10:45 small support group discussions about motive profiles

a) practice communication skills
b) describe what results mean to you
c) describe your feelings

11:30 lunch

12:15 tinker toy bridge experience for team development

4:00 write your personal-professional goals

Friday — Entry Procedures and Contracting

9:10 Lecturette on Entry

9:30
a) small groups write a typical entry scenario and this is then passed on to another group

b) other groups use the principles of entry to discuss how they will meet this person and what they will do in the ten minute period (choose one member to do it)

c) role plays

d) debriefing

11:45 lunch

12:30 staff fishbowl on design dilemmas (model behavior, be open about where we are, give information, state dilemmas)

1:00 small group reactions to fishbowl and about next week

1:45 contracting

Monday — Media Day

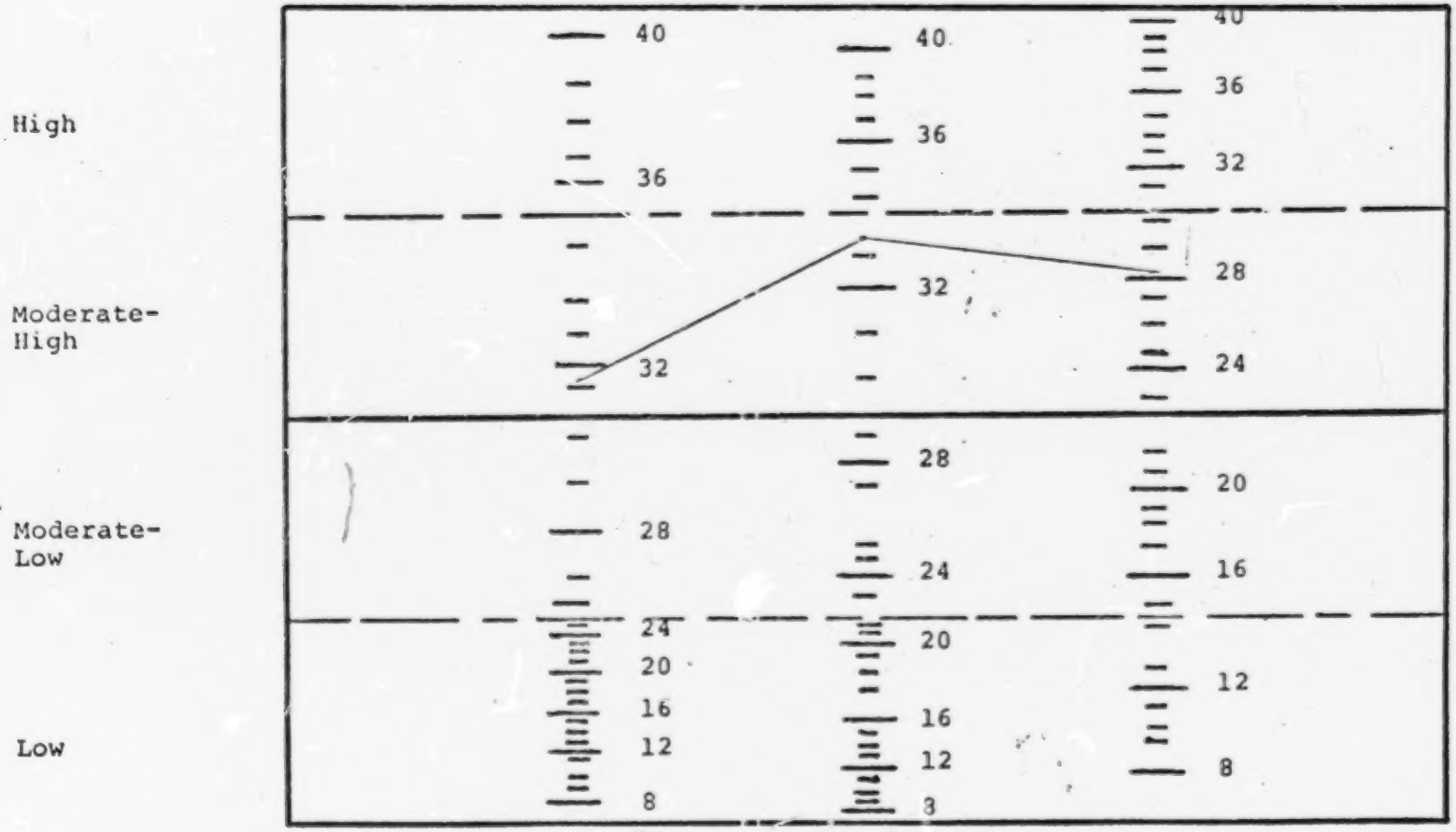
A. Several films on different teaching styles are shown

B. After each film the community breaks into small groups and ranks (evaluates) the teaching style according to the criteria learned in the workshop (e.g., effective communications, entry helping relationships, etc.)

Tuesday-Friday — Goal-Setting, Problem-Solving, Action-Planning Sequence (see Appendix)

WORK ANALYSIS PROFILE

NAME Staff Development Department



APPENDIX II

CONTRACT

Major Emphases

1) Communication: Four communication skills will be learned the first day and used throughout the Institute.

2) Establishing Performance Objectives: A major theme of the Institute concerns goal orientation. Participants learn more about goal theory, their own goal orientations, goals that they wish to accomplish next year, and department-wide objectives.

3) The Helping Relationship: How to be more helpful when interacting with others, establishing better contracts and expectations when interacting, and introspecting for increased understanding of self as a resource person -- these are all emphasized during the first week.

4) Working More Effectively In Groups: Being a better group member and having more effective group relationship are subjects for investigation.

5) Problem-Solving and Action-Planning: The Institute will not only help each individual to discover new skills for effectiveness. In addition, the whole department will use certain methods to arrive at better solutions for reaching its departmental objectives.

Events supporting the Contract

1. To learn skills for communicating more effectively

   * the four communication skills (Monday, Tuesday, Monday II)

2. Setting goals and learning goal-setting behavior

   * The business game (Tuesday)
   * Juan Velasco case (Tuesday)
   * Scoring for dominant themes (Wednesday, Thursday)
   * Setting personal-professional goals (Thursday, Friday)
   * Setting department-wide goals (Tuesday, Wednesday II)

3. The helping relationship

   * Block piling experience (Wednesday)
   * Tinker toy bridge game (Wednesday)
   * Entry procedures (Friday)

4. Learning about self

   * Readings on motivation (Tuesday, Wednesday)
   * Motive profile (Thursday)
   * Karen Mercani case (Thursday)
   * Motivated style (Thursday)
   * Work analysis and job "fit" (Thursday)

5. Group processes

   * Task and process roles (Tuesday)
   * Reinforcement of communication skills
   * Working in small groups

6. Action-planning and problem-solving

   * The force field analysis (Wednesday II)
   * Action-planning sequence (Thursday and Friday II)

APPENDIX II

Organizational Goal-Setting and Problem-Solving

C. Brooklyn Derr
Spring, 1972

The following process is intended as a guide for helping educators improve their organizational performance. It specifies systematic steps that will help set goals and solve problems. It takes approximately three days (21 hours) to complete the whole sequence.

An organizational goal is defined as an ideal state that is agreed to by the members of the organization. The key idea about a goal is that it is someplace where you are not but where you would like to be . In order to serve as a motivating force, a goal must be clearly stated and accepted by all concerned.

An organizational problem is defined as any discrepancy between the organizational goal and the current state of affairs. Therefore, members of the organization must be aware of the goal not being reached if they are to be clear about the nature of the problem.

Phase I; The Targets (Goals)

45 min. A. Step 1: identifying goals

Working in small groups and using the "brainstorming" technique, identify as many relevant goals as you can for your organization.

Write the goal statements where everyone can see them, e.g. on a sheet of newsprint and then posted on the wall. Elicit as many statements as people seem willing to give.

Brainstorming

The individuals in the group should think up as many ideas as it can (brainstorm) on the specific charge that has been made. Brainstorming is a time to suspend critical judgement. While everyone tries to put forth good ideas, the emphasis is on making others feel free enough to risk an idea openly and quickly without risking personal rejection or negative evaluation.

In brainstorming,

Nobody says, "no"

Nobody says, "it will never work"

Nobody says, "that's a poor idea"

Nobody says, "that has already been mentioned"

45 min. B. Step 2: making choices about goals

(1) Now try to choose the five goal statements that you think are most important. Some statements will cancel themselves out because they overlap with others, or it may be possible to rewrite the sentence to include several ideas. Some statements will obviously not be as important as others. However, it could be difficult to make the final choice. If it is, use the following method for making decisions by consensus.

Consensus

Group consensus represents a decision-making method in which all participants contribute resources and all share in the final decision. No decision becomes final which is not understood by nearly all members; for this reason, consensus is difficult and sometimes impossible to obtain. It requires a fairly advanced skill in two-way communication, coping with conflict, and using individual resources.

For us, consensus does not mean a unanimous vote; nor does it mean that everyone agrees. It means that (a) everyone can paraphrase the issue to show that he understands it, (b) everyone has a chance to describe his feelings about the issue, and (c) those who continue to disagree or have doubts, indicate publicly that they are willing to give the decision an experimental try for a prescribed period of time. Consensus is a condition in which every member is willing to go along without sabotaging the decision. This does not mean that the decision represents everyone's first choice. It means that a sufficient number of people are in favor of getting the decision carried out while others understand what is happening and will not obstruct it.

An essential technique for obtaining a consensus is the survey. The full use of this technique involves the following: First, someone presents the issue clearly. Then, one or two others attempt to clarify it by restating it. Then everyone in turn states his reactions to the proposal. (this is taking a survey)

Each person should be as brief as possible while still being clear, but he need not restrict himself to yes or no. He might say that he is uncertain, that he is confused and wants to hear more, that he is experiencing some pain, or he can simply say that he does not wish to talk about it. A group using the survey should not allow an individual to remain completely silent. If someone does not want to speak, he must at least say explicitly he wants to say nothing. This assures the group of bringing up to date its knowledge of every member's point of view on the question and of doing so through explicit statements, not presumptions.

15 min.

(2) Now order the five goal statements by priority. The first statement should be the most important and the fifth one least important.

15 min.

(3) Do not get bogged down writing careful behavioral objectives at this point. Yet, each goal statement should be clear, specific and achievable.

C. Step 3: sharing across groups

15 min

(1) Write your five prioritized goal statements on newsprint and post them on the wall as directed.

(2) There will be a "milling" activity (perhaps during break or lunch) at which time members of the various groups will read and discuss the goals of the other groups. It is especially important to look for the three or four goals that seem to be important to everyone.

D. deciding community (organization-wide) goals

1 hr.

(1) Two groups should merge and, with their five goals each (a total of ten statements) posted in front of them, should decide on the <u>five</u> statements that are most important to the members of both groups. In some instances, two or more statements could be amalgamated.

This process can be very difficult because each group has already developed its own identity and tends to demonstrate "ownership" of its own goals. We must begin to think as a larger unit so that we eventually develop organization-wide goals that all persons will adopt. Thus, try to collaborate instead of to compete.

Make this decision by consensus.

15 min.

(2) Now prioritize the five goals you have chosen so that you end up with one sheet with the five statements written and ordered according to their importance.

(3) Now go to a place, as directed, to participate in a mass meeting wherein the organization-wide goals will be chosen.

15 min.

(a) The first step is to post the written statements for all to see. Try to amalgamate or consolidate as many statements as possible.

30 min.

(b) There is no attempt here to "drop" a statement from the list. Rather, the task is to prioritize the statements from (1) most important to (2) least important. Give persons an opportunity to speak on behalf of a certain statement or of a particular order, if they so desire.

15 min.

(c) Ask the persons present to vote for <u>three</u> statements. The number of votes should be recorded to the side of each statement. The statement with the most votes should then be recognized as most preferred, etc., and it is possible to identify the top choices.

Phase II: The Situation (Goal Discrepancy)

45 min.

A. Stage I: group identification

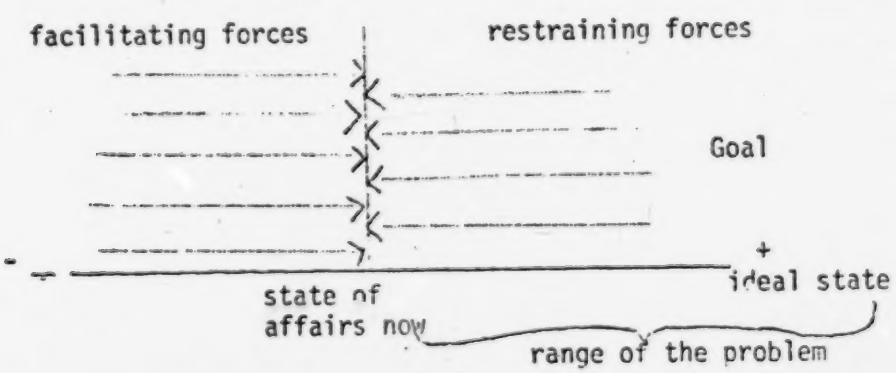
A number of small groups (according to the number of consultants available) should be formed according to a corresponding number of goals. If there will be four groups, for example, then these groups would work on the four most important goals taken from the prioritized list.

Members of the various groups would be chosen according to who wants to work on which goal. Therefore, persons in a particular group should all be keenly interested in helping to attain that particular goal.

Once in your group, decide on who will attend to matters of task and process while you work. Take care of other matters of contracting.

1 1/2 hrs.

B. Step 2: Force Field Analysis



Think of the goal your group is working towards as being at the far right hand side of the horizontal line above. Its position is the ideal state. The vertical line represents the current state of affairs. The distance between the present state and the ideal state is the range of the problem.

There are numerous forces at work, some of which keep you from reaching your goal and some of which are helping you to reach your objective. That is, there are forces that restrain change and forces that facilitate it.

These forces are of varying orders of importance. Some restraining forces, for example, are major blocks while others are not so important for keeping you from reaching your goal. Thus, the forces can be weighted or ordered (i.e. assigned priority) according to which ones are most significant.

Use this diagram and complete a force field analysis in order to identify the current state of affairs.

By brainstorming, make a list on newsprint of the facilitating forces and another list of the restraining forces. Your lists should include psychological, interpersonal, institutional and even societal factors. If a force seems to be a complex of multiple separate obstacles, each individual element should be listed separately.

Avoid arguing over the forces at this time. Critical judgement is important later in the process but not right now.

1 hr.

C. Step 3: Checking on the Group's Effectiveness

You've been working on a task. Like an automobile, a group needs maintenance. While working on a task, a group needs to stop occasionally to be explicit about its interpersonal processes. The members should fill out the three scales below by circling one number in each.

What I say is prized and valued here	6	5	4	3	2	1	What I say is being ignored here
Our group is falling into traps	6	5	4	3	2	1	Our group is avoiding traps
I have participated often	6	5	4	3	2	1	I have participated very little

When discussing answers on the three scales with the group, try to be helpful.

helpful

You will tend to be helpful when you are specific (e.g., "I felt valued by you, John, because often you asked me to say more when I spoke," or "An example of when I thought we fell into a trap was. . .," or, "I felt put down when you. . .")

not helpful

You will tend to be unhelpful if you are general and evaluative (e.g., "You're the kind of person who puts people down," or "This group isn't working well," or "This group is the greatest I've ever been in.")

Phase III: Path (Action Planning)

1 hr.

A. Step 1: ordering the restraining forces

Research shows that to reach a goal it is more important to remove the restraining forces than to increase the facilitating forces. Therefore, it is necessary to order the important restraining forces according to which ones are (1) most solvable given the present resources (4) least solvable. Only four forces should eventually be identified and prioritized.

Make this decision by consensus.

Avoid the pitfall of arguing about unsolvable items or about opinions which cannot be supported with data. If you lack important information, try to collect some data from colleagues outside the group or from others who have the information.

2 hrs.

B. Step 2: generating multiple solutions

This stage is a time to be creative and to have fun. Take each restraining force in turn, and think up ways to extinguish its power. Brainstorm your ideas. Be silly! Be wild! Pool your wildness! Proceed to the next force and give it the works.

C. Step 3: designing plans for action

Once the group has generated possible solutions, it should again use critical judgement to build concrete proposals for action. The following points may be helpful:

1 hr. (a) Choose the brainstormed ideas that seem best for attacking your restraining forces.

1 hr. (b) Decide what groups or persons should expedite them.

1 hr. (c) Put the ideas and actions into a time sequence.

1 hr. (d) Estimate specific dates for actions to occur.

1 1/2 hrs. (e) Make plans for beginning the action sequence.

1 hr. (f) Now take time again to discuss how the group is working. Do you feel a part of the action? Why or why not? What are the feelings of various members in the group? What could be done to improve the process?

30 min. (g) Try to imagine anything that could go wrong with your action plans and design contingency plans.

x (h) Prepare a presentation of your various action plans to the whole group. You should not take more than 15 minutes. Be as specific as possible.

3 hrs. Phase IV: Reporting

Report group action plans to the whole community. These plans discuss how to solve problems for arriving at various goal states. Discuss the possibility of establishing these groups as task forces. After they receive feedback from the whole group about their action plans, they could then follow through on some of the ideas. The various plans should be compiled by each group and made part of an Institute report which makes recommendations for the future.

May 23, 1972

Dear Staff Development Participant

in the Boston-Harvard Institute:

One of the parts of our training is to help you gain insight about your own dominant motives and how they impinge on your effectiveness in the helping relationship. To do this, we use an instrument developed by Dr. David McClelland of Harvard and validated in 56 countries over a fifteen year period.

We are asking you to take thirty minutes to complete the instrument according to the instructions on the cover. Then return it to us by Monday, May 31. The results, when scored by professionals at McBer and Co. of Cambridge, will be returned to each participant along with his motive profile on the third day of the Institute. This will provide a basis for our discussion.

Please trust us enough to sign your name on the cover of the instrument. I ask you this for two reasons. First, we need to know who did and did not return the completed questionnaire so that we can get one from everyone. Second, we must be able to return your own instrument to you so that you can learn from it during the workshop.

We do not plan to use the motive profile to evaluate anyone. We are interested in the total group profile and how it varies over time, and we are also interested in trying to use the data to help you better understand yourself. Thus, you as an individual are not being researched or evaluated!! This is all part of the training and nobody will be allowed to see your information if you do not volontarily show it to them.

We look forward to seeing you soon.

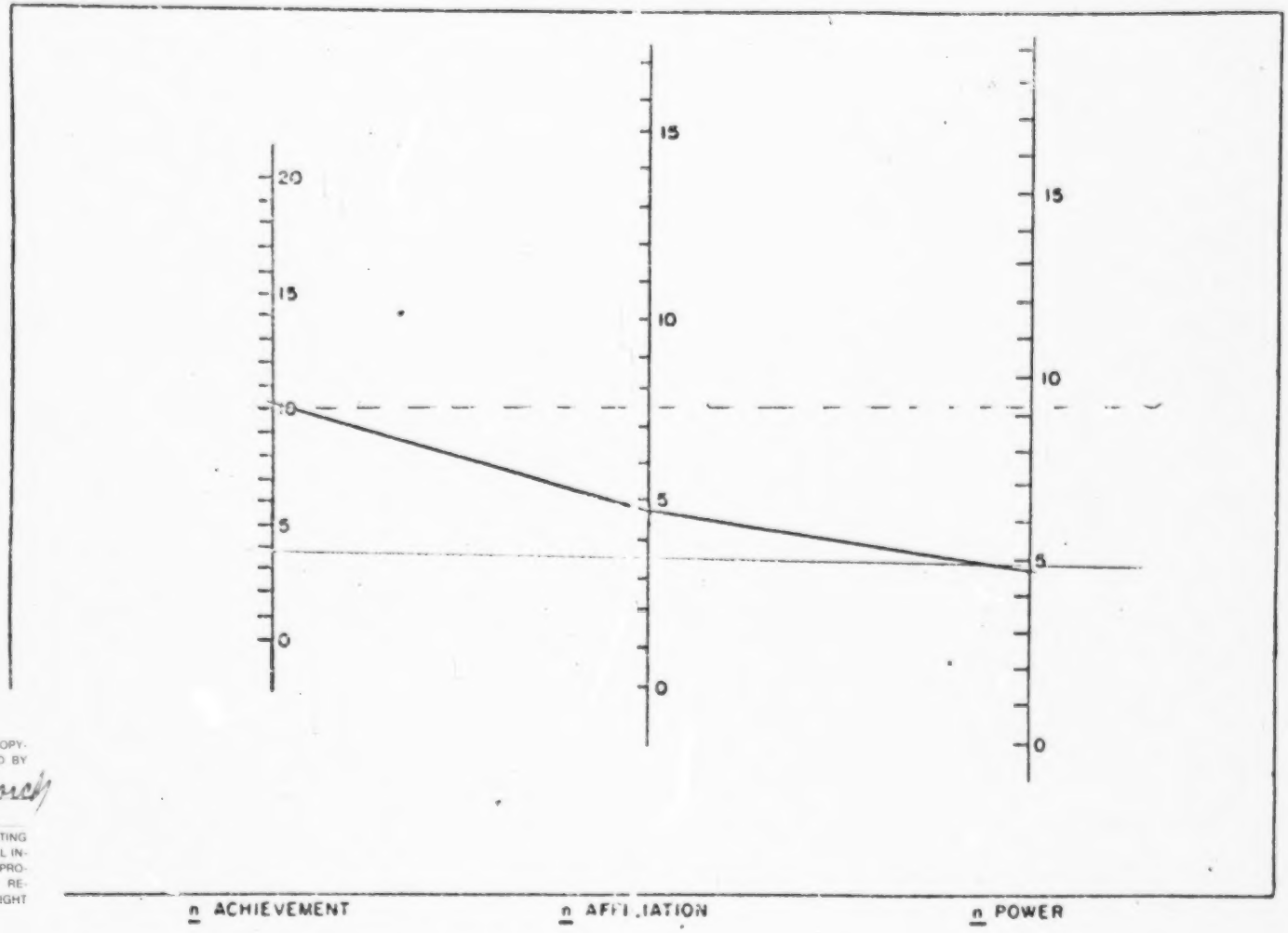
Sincerely,

C. Brooklyn Derr

C. Brooklyn Derr
Assistant Professor

Brook Derr/School of Education

Exercise of Imagination Profile for GROUP PROFILE



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